

The ~~Honey~~ Money Do List

DO

1. Act in accordance with SEC regulations
2. Hire a securities attorney
3. Have a professional image
 - a. web site & email address (not gmail/yahoo/hotmail)
 - b. head shot
 - c. business cards
 - d. voice mail greeting
 - e. confident demeanor
4. Take an educational approach
5. Have a system for managing process and communications
 - a. Link: <https://realbluespruce.com/real-estate-investing-technology/>
6. Ask open ended questions
7. Listen to the investor's goals
8. Give the investor permission to say "no"
9. Present the opportunity in a way that answers the investor's concerns... and only the investor's concerns
10. Ask if there are other people involved in the decision (i.e. spouse)

DON'T

1. Try to write the private placement yourself
2. Dress like a slob
3. Try to do everything over email
4. Get attached to a specific outcome
5. Talk endlessly about things that do not match the investor's needs